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This dashboard was updated on August 28, 2026, and now includes:



- GMAS budget categories with subject to overhead/ not subject to overhead headings display by default with the ability to toggle to object-level view. Links to transaction details are still displayed and allow for navigation to additional detail.
- Link to Period Expense Report that includes GMAS budget category indicators.

Summary

The [New Grants Financial Dashboard](#) supports review of budget and expense information at the object level, by fund and can help to answer the following questions:

- What is the spending on a fund?
- What is the overall financial health of a project for one or across multiple accounts?
- Has the budget been updated in GMAS to support monitoring, as needed?

These examples are just a few of the many questions this dashboard can answer.

Navigation

Visit the [dashboard directly](#) or through the [Research Administration and Compliance Reporting Landing Page](#) in HART.

At the top left of each dashboard page are breadcrumbs that allow you to return the Research Administration and Compliance Reporting landing page.

Research Administration and Compliance Reporting > **Grants Financial**

Security

All Grants Financial and Printable Grants Financial users have access to this dashboard. However, the selection of funds available is limited to the funds/projects that you have access to in GMAS. Note that part-of account access aligns with access in GMAS. Specifically, if there is access at the fund-level fund in GMAS, there is access to the associated part-of details.

Display summary

The New Grants Financial dashboard shows a combined view of the Grants Financial and Printable Grants Financial.

Research Administration and Compliance Reporting > **Grants Financial**

Fund: [dropdown] Expenses between: SEP-26 - SEP-26

SEGMENT SUMMARY INFORMATION

Project: [dropdown] Closed

PI: [dropdown] Sponsor: US Agency for International Development

Authorized: \$6,214,101.00 Anticipated: \$6,214,101.00

Obligated dates: Mar 01, 1997 - Nov 30, 2000 Anticipated end: Nov 30, 2000

ACCOUNT SUMMARY INFORMATION

Main Fund Activity Subject Root 0001

Type: Main Status: Closed Year: YO IDC: MTDC 26%

Allocated total: \$5,846,190.00 Dates: Mar 1, 1997 - Nov 30, 2000

Budget: \$5,557,685.00 Expenses: \$5,893,368.08 Remaining Budget: (\$335,683.08) 106.04% expended

ACCOUNT DETAIL VIEW

Account	Grp	Type	Name	Allocated	Budget	Expenses
☐ All accounts						
☒ .0001 01 M Main				5,846,190	5,557,685	5,893,368
☐ .0002 01 S Center For Social And E...				367,911	367,911	311,241

Category summary

Category summary	Current budget	Period expenses for SEP-26	Total expenses through SEP-26	Remaining budget	% expended
Category summary - overhead					
Object code detail	2,021,829.00	0.00	1,828,458.44	193,370.56	90.44
Fringe Benefits	285,489.00	0.00	305,271.21	(19,782.21)	106.93
Supplies	0.00	0.00	168,249.79	(168,249.79)	
Space		0.00	20,029.84		
Travel	329,717.00	0.00	401,294.99	(71,577.99)	121.71
Professional Svcs	0.00	0.00	647,502.31	(647,502.31)	
Other Expenses	272,241.00	0.00	1,033,744.92	(761,503.92)	379.72
	2,909,276.00	0.00	4,404,551.50	(1,495,275.50)	151.40
Direct costs not subject to overhead					
Total Expenses, Budget Only	454,696.00	0.00	0.00	454,696.00	0.00
Equipment	72,439.00	0.00	37,149.67	35,289.33	51.28
Space	0.00	0.00	243,013.11	(243,013.11)	
Other Expenses		0.00	287.00		
Sponsored Budget Only	1,081,618.00	0.00	0.00	1,081,618.00	0.00
	1,608,753.00	0.00	280,449.78	1,328,303.22	17.43
Direct costs Total	4,518,029.00	0.00	4,685,001.28	(166,972.28)	103.70
Indirect costs Total	1,039,656.00	0.00	1,208,366.80	(168,710.80)	116.23
Grand Total	5,557,685.00	0.00	5,893,368.08	(335,683.08)	106.04

Export

Sections and definitions

The following section provides descriptions of some of the data as labeled on the dashboard.

1. Two prompt options for results

- Fund: Select the fund to review. Once the fund is chosen, accounts to select will display. *Required.*
- Expenses between: Choose expenses between two periods. *Defaults to this period for both prompts.*

Note: If a period prior to the start of the project is chosen, information may not display (and a loading icon may appear stuck). Choose a later start period in the between selector to update the display if this occurs.

2. Segment Summary Information

- Project ID: Link to segment in GMAS
- Project Status: Combined primary and secondary status
- Project Name: Project nickname then full title, as applicable
- PI: Project PI Last Name, First Name
- Sponsor: Harvard sponsor. Prime also displays when applicable

- Authorized Amount: Corresponding with dates and dollars in GMAS
 - Anticipated Amount: Corresponding with dates and dollars in GMAS
 - Obligated Dates: Corresponding with dates and dollars in GMAS
 - Anticipated Dates: Corresponding with dates and dollars in GMAS
3. Account selection: Select one or many accounts to view.
- a) Click the Account detail view to reference and export additional details about each account.
 - Defaults to “All accounts” when there is more than one account on a project.
 - Shows group (as grp), account type acronym, the short name, and total allocated, budget, and expenses.
4. Download options
- Printable Grants Financial (PDF): Based on the chosen Fund and accounts, click this link do download and view this information (and more) in the classic Printable Grants Financial format.
 - Period Expense Report (Excel): Shows account expenses by month, over the last 24 periods of expenses.
5. Account Summary Information
- a) When only a single account is chosen, details display, including
 - Account Description: Link to the account details in GMAS
 - Account String: Tub, org, fund, activity, subactivity, and root
 - Type of account
 - Status of account
 - Allocated total
 - Dates of the account
 - Year label
 - Indirect Cost (IDC) rate, with Modified Total Direct Cost (MTDC) percentage
 - b) When “All accounts”, more than one account, or a single account is chosen: Totals display, including
 - Budget Amount¹: Total for account(s) selected
 - c) Expenses:
 - Remaining Budget: Total for account(s) selected, with a percentage expended
 - Total for account(s) selected and links to the
 - [Transaction Listing All \(TL\)](#) dashboard if you already have access to this level of detail.
 - [Transaction Listing Summ Comp \(TL\)](#) dashboard if you have only summary level access.
 - No link will appear if you do not have financial dashboard access.
- For more information about expected behavior between dashboards, view: [Grants Financial to Transaction Listing Navigation Tips](#)*
6. Expense details
- When “All accounts”, more than one account, or a single account is chosen: Displays total for account(s) selected
 - a) Shows Budget, Expenses, percentage expended, and remaining budget by GMAS Budget Category or Object Code/rolled up by the object code category which can be changed using the view selector.
 - b) Where expense amounts are links, click to view details about those expenses on the
 - [Transaction Listing All \(TL\)](#) dashboard if you already have access to this level of detail.
 - [Transaction Listing Summ Comp \(TL\)](#) dashboard if you have only summary level access.

¹ Budget information is based on what is entered in GMAS: <https://gmas.racs.research.harvard.edu/creating-editing-gl-budgets>

- No link will appear if you do not have financial dashboard access.
For more information about expected behavior between dashboards, view: [Grants Financial to Transaction Listing Navigation Tips](#)

Get the extra benefits of using this dashboard by entering and updating sponsored budgets in GMAS, the source of budget data for this dashboard.

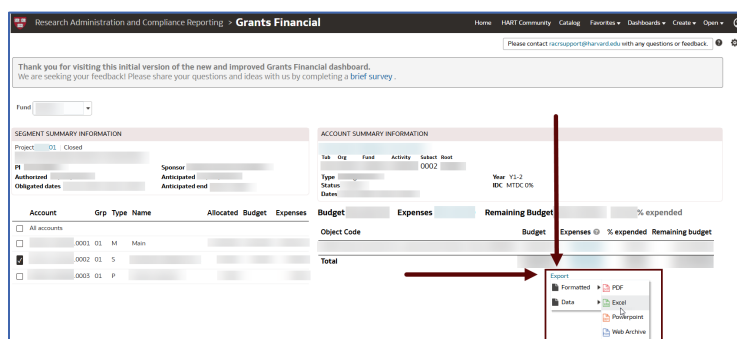


- Reference [GMAS guidance on creating and editing budgets](#).
- Complete training: [Budgets and Budget Justifications](#)

Export data

There are three options to export data:

- Click the “Printable grants financial (PDF)” link at the upper-right of the screen. Information (what is on the screen, along with other details) will be exported based on the chosen Fund and accounts and will be displayed in the classic Printable Grants Financial format.
- Click the “Period Expense Report (Excel)” link at the upper-right of the screen. Includes account expenses by month, over the last 24 months/periods of expenses. Includes a column for (summary) total expenses that were incurred over 24 months ago.
- Scroll to the bottom of the screen (bottom of the Expense details table) and locate the “Export” link. Select either “Formatted” or “Data”. The exported file of data on-screen will be downloaded.



Additional information

[RACR Landing Page \(in HART\)](#)

[RACR Support Site](#)

Help Desk: racrsupport@harvard.edu

Reference: Comparing Grants Financial Dashboards

The same level of budget and expense information is present. However, with this simplified view in New Grants Financial, the following differences may be expected across the three dashboards.

Grants Financial (Legacy)

Printable Grants Financial

New Grants Financial

→ **Budget, Expenses and Remaining Budget Information are displayed in separate locations on one screen.**

- Legacy interaction: detailed prompts to filter down to specific items
- Tabs: Showing different levels of information for funds and accounts (including summary, period transactions, direct and indirect costs, and object rollup)
- For account-level summary reporting with project context that is otherwise available on this dashboard, try using the [GMAS Accounts](#) lookup
- *Known bug: budget data on only this dashboard may be incorrect.*

→ **Budget, Expenses and Remaining Budget Information is displayed on tabbed view – in the dashboard view, you have to scroll a page to find the information.**

- Legacy interaction: detailed prompts to filter down to specific items
- No tabs but extended scroll: Showing different levels of information for funds and accounts.
- Access a formatted, downloadable version of this view from the new Grants Financial Dashboard.

→ **Budget, Expenses and Remaining Budget Information are displayed at the top of the new Grants Financials screen in one central location.**

- Updated look and feel: minimized prompts and account selection limited to relevant items in fund (minimizing the need to scroll).
- No tabs: One central location combining views. Does not include all data in tabbed views in Grants Financial, including Modified Total Direct Cost (MTDC). However, includes MTDC % per account.
- Ability to select 'All Account', multiple, or one account drill down which shows the account summary information and links to Transaction Listing.
- Access
 - Printable Grants Financial download from this dashboard, supporting existing operations that use this report.
 - Period Expense Report download from this dashboard with detailed expense by period/month data.